

**CARL M. AND BARBARA LEVIN**

Individual Income Tax Return

For the year ended December 31, 2012

For the year Jan. 1-Dec. 31, 2012, or other tax year beginning , 2012, ending , 20 . See separate instructions.

Your first name and initial **CARL M.** Last name **LEVIN** Your social security number [REDACTED]

If a joint return, spouse's first name and initial **BARBARA** Last name **LEVIN** Spouse's social security number [REDACTED]

Home address (number and street). If you have a P.O. box, see instructions. [REDACTED] Apt. no. [REDACTED] Make sure the SSN(s) above and on line 6c are correct.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below. [REDACTED] Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.

Foreign country name Foreign province/state/county Foreign postal code [REDACTED] ☒ You ☒ Spouse

**Filing Status** 1 ☐ Single 4 ☐ Head of household (with qualifying person). If the qualifying person is a child but not your dependent, enter this child's name here. 2 ☒ Married filing jointly (even if only one had income) 3 ☐ Married filing separately. Enter spouse's SSN above and full name here. 5 ☐ Qualifying widow(er) with dependent child

**Exemptions** 6a ☒ Yourself. If someone can claim you as a dependent, do not check box 6a 6b ☒ Spouse Boxes checked on 6a and 6b 2 No. of children on 6c who: • lived with you • did not live with you due to divorce or separation (see instructions) c Dependents: (1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) If child under age 17 qualifying for child tax credit If more than four dependents, see instructions and check here ☐ Dependents on 6c not entered above Add numbers on lines above 2 d Total number of exemptions claimed

**Income** 7 Wages, salaries, tips, etc. Attach Form(s) W-2 7 151,121. 8a Taxable interest. Attach Schedule B if required 8a 212. b Tax-exempt interest. Do not include on line 8a 8b 9a Ordinary dividends. Attach Schedule B if required 9a 9b Qualified dividends 9b 10 Taxable refunds, credits, or offsets of state and local income taxes STMT 2 STMT 3 10 0. 11 Alimony received 11 12 Business income or (loss). Attach Schedule C or C-EZ 12 13 Capital gain or (loss). Attach Schedule D if required. If not required, check here ☐ 13 14 Other gains or (losses). Attach Form 4797 14 15a IRA distributions 15a 15b Taxable amount 15b 9,547. 16a Pensions and annuities 16a 16b Taxable amount 16b 37,248. 17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E 17 18 Farm income or (loss). Attach Schedule F 18 19 Unemployment compensation 19 20a Social security benefits 20a 44,863. 20b Taxable amount 20b 38,134. 21 Other income. List type and amount 21 22 Combine the amounts in the far right column for lines 7 through 21. This is your total income 22 236,262.

**Adjusted Gross Income** 23 Educator expenses 23 24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ 24 25 Health savings account deduction. Attach Form 8889 25 26 Moving expenses. Attach Form 3903 26 27 Deductible part of self-employment tax. Attach Schedule SE 27 28 Self-employed SEP, SIMPLE, and qualified plans 28 29 Self-employed health insurance deduction 29 30 Penalty on early withdrawal of savings 30 31a Alimony paid b Recipient's SSN 31a 32 IRA deduction 32 33 Student loan interest deduction 33 34 Tuition and fees. Attach Form 8917 34 35 Domestic production activities deduction. Attach Form 8903 35 36 Add lines 23 through 35 36 37 Subtract line 36 from line 22. This is your adjusted gross income 37 236,262.

**Tax and Credits**

Standard Deduction for -  
• People who check any box on line 39a or 39b or who can be claimed as a dependent.

• All others:  
Single or Married filing separately, \$5,950  
Married filing jointly or Qualifying widow(er), \$11,900  
Head of household, \$8,700

38	Amount from line 37 (adjusted gross income)	38	236,262.
39a	Check <input checked="" type="checkbox"/> You were born before January 2, 1948, <input type="checkbox"/> Blind. <input checked="" type="checkbox"/> Spouse was born before January 2, 1948, <input type="checkbox"/> Blind. Total boxes checked ... 39a 2		
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here ... 39b <input type="checkbox"/>		
40	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	40	43,146.
41	Subtract line 40 from line 38	41	193,116.
42	Exemptions. Multiply \$3,800 by the number on line 6d	42	7,600.
43	Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-	43	185,516.
44	Tax. Check if any from: a <input type="checkbox"/> Form(s) 8814 b <input type="checkbox"/> Form 4972 c <input type="checkbox"/> 962 election	44	39,723.
45	Alternative minimum tax. Attach Form 6251	45	195.
46	Add lines 44 and 45	46	39,918.
47	Foreign tax credit. Attach Form 1116 if required	47	
48	Credit for child and dependent care expenses. Attach Form 2441	48	
49	Education credits from Form 8863, line 19	49	
50	Retirement savings contributions credit. Attach Form 8880	50	
51	Child tax credit. Attach Schedule 8812, if required	51	
52	Residential energy credits. Attach Form 5695	52	
53	Other credits from Form: a <input type="checkbox"/> 3800 b <input type="checkbox"/> 8801 c <input type="checkbox"/>	53	
54	Add lines 47 through 53. These are your total credits	54	
55	Subtract line 54 from line 46. If line 54 is more than line 46, enter -0-	55	39,918.
56	Self-employment tax. Attach Schedule SE	56	
57	Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919	57	
58	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	58	
59a	Household employment taxes from Schedule H	59a	709.
b	First-time homebuyer credit repayment. Attach Form 5405 if required	59b	
60	Other taxes. Enter code(s) from instructions	60	
61	Add lines 55 through 60. This is your total tax	61	40,627.

**Other Taxes****Payments**

If you have a qualifying child, attach Schedule EIC.

62	Federal income tax withheld from Forms W-2 and 1099	62	45,468.
63	2012 estimated tax payments and amount applied from 2011 return	63	
64a	Earned income credit (EIC)	64a	
b	Nontaxable combat pay election	64b	
65	Additional child tax credit. Attach Schedule 8812	65	
66	American opportunity credit from Form 8863, line 8	66	
67	Reserved	67	
68	Amount paid with request for extension to file	68	
69	Excess social security and tier 1 RRTA tax withheld	69	
70	Credit for federal tax on fuels. Attach Form 4136	70	
71	Credits from Form: a <input type="checkbox"/> 2439 b <input checked="" type="checkbox"/> Reserved c <input checked="" type="checkbox"/> 8801 d <input type="checkbox"/> 8885	71	38.
72	Add lines 62, 63, 64a, and 65 through 71. These are your total payments	72	45,506.

STATEMENT 6

**Refund**

Direct deposit? See instructions.

73	If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you overpaid	73	4,879.
74a	Amount of line 73 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	74a	4,879.
b	Routing number <input type="text"/> c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings d Account number <input type="text"/>		
75	Amount of line 73 you want applied to your 2013 estimated tax	75	

**Amount You Owe**

76	Amount you owe. Subtract line 72 from line 61. For details on how to pay, see instructions	76	
77	Estimated tax penalty (see instructions)	77	

**Third Party Designee**

Do you want to allow another person to discuss this return with the IRS (see instructions)? ☒ Yes. Complete below. ☐ No

Designee's name **HAROLD GROSSBART** Phone no. **248-372-7300** Personal identification number (PIN)

**Sign Here**

Joint return? See instructions. Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.			
Your signature	Date	Your occupation	Daytime phone number
<b>SENATOR</b>		<b>SENATOR</b>	
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent you an Identity Protection PIN, enter it here
<b>RETIRED</b>		<b>RETIRED</b>	

**Paid**

Preparer <b>HAROLD GROSSBART</b>	Preparer's signature <b>HAROLD GROSSBART</b>	Date <b>04/09/13</b>	Check <input type="checkbox"/> If self-employed	PTIN <b>P00123779</b>
Use Only	Firm's name <b>BAKER TILLY VIRCHOW KRAUSE, LLP</b>	Firm's EIN <b>24-8372730</b>	Phone no. <b>248-372-7300</b>	
	ONE TOWNE SQUARE SUITE 600			
	Firm's address <b>SOUTHFIELD, MI 48076</b>			

**SCHEDULE A**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)  
Name(s) shown on Form 1040

**Itemized Deductions**

► Information about Schedule A and its separate instructions is at [www.irs.gov/form1040](http://www.irs.gov/form1040)  
► Attach to Form 1040.

OMB No. 1545-0074

**2012**  
Attachment  
Sequence No. 07

Your social security number

CARL M. & BARBARA LEVIN

<b>Medical and Dental Expenses</b>		Caution. Do not include expenses reimbursed or paid by others.			
1	Medical and dental expenses (see instructions)			1	
2	Enter amount from Form 1040, line 38	2		2	
3	Multiply line 2 by 7.5% (.075)			3	
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-			4	
<b>Taxes You Paid</b>		5 State and local (check only one box):		5	11,142.
	a <input checked="" type="checkbox"/> Income taxes, or				
	b <input type="checkbox"/> General sales taxes				
6	Real estate taxes (see instructions)	SEE STATEMENT 8		6	7,428.
7	Personal property taxes			7	
8	Other taxes. List type and amount			8	
9	Add lines 5 through 8			9	18,570.
<b>Interest You Paid</b>		10 Home mortgage interest and points reported to you on Form 1098		10	
	11 Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address			11	
Note.	Your mortgage interest deduction may be limited (see instructions).			12	
12	Points not reported to you on Form 1098. See instructions for special rules			13	
13	Mortgage insurance premiums (see instructions)			14	
14	Investment interest. Attach Form 4952 if required. (See instructions.)			15	
15	Add lines 10 through 14			15	
<b>Gifts to Charity</b>		16 Gifts by cash or check. If you made any gift of \$250 or more, see instructions		16	20,496.
	17 Other than by cash or check. If any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500			17	
18	Carryover from prior year			18	
19	Add lines 16 through 18			19	20,496.
<b>Casualty and Theft Losses</b>		20 Casualty or theft loss(es). Attach Form 4684. (See instructions.)		20	
<b>Job Expenses and Certain Miscellaneous Deductions</b>		21 Unreimbursed employee expenses - job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.)		21	130.
	UNION AND PROFESSIONAL DUES		130.	22	950.
22	Tax preparation fees			23	7,725.
23	Other expenses - investment, safe deposit box, etc. List type and amount	EXPENSES FOR MEMBER OF CONGRESS	7,725.	24	8,805.
24	Add lines 21 through 23			25	236,262.
25	Enter amount from Form 1040, line 38	25	236,262.	26	4,725.
26	Multiply line 25 by 2% (.02)			27	4,080.
27	Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-			28	
<b>Other Miscellaneous Deductions</b>		28 Other - from list in instructions. List type and amount		28	
<b>Total Itemized Deductions</b>		29 Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40		29	43,146.
30 If you elect to itemize deductions even though they are less than your standard deduction, check here				30	

**SCHEDULE B**  
(Form 1040A or 1040)

Department of the Treasury  
Internal Revenue Service  
Name(s) shown on return

**Interest and Ordinary Dividends**

▶ Attach to Form 1040A or 1040.

OMB No. 1545-0074

**2012**

Attachment  
Sequence No. 08

(99) ▶ Information about Schedule B (Form 1040A or 1040) and its instructions is at [www.irs.gov/form1040](http://www.irs.gov/form1040)

Your social security number

CARL M. & BARBARA LEVIN

**Part I  
Interest**

- 1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see instructions and list this interest first. Also, show that buyer's social security number and address ▶
- NATIONAL CAPITAL BANK
- U.S. SENATE FEDERAL CREDIT UNION

Amount

198.

14.

**Note.** If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

- 2 Add the amounts on line 1
- 3 Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815
- 4 Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 1040, line 8a ... ▶

212.

212.

**Note.** If line 4 is over \$1,500, you must complete Part III.

**Part II  
Ordinary  
Dividends**

- 5 List name of payer ▶

**Note.** If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

- 6 Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ... ▶

**Note.** If line 6 is over \$1,500, you must complete Part III.

**Part III  
Foreign  
Accounts  
and  
Trusts**

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

- 7a At any time during 2012, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions
- If "Yes," are you required to file Form TD F 90-22.1 to report that financial interest or signature authority? See Form TD F 90-22.1 and its instructions for filing requirements and exceptions to those requirements
- b If you are required to file Form TD F 90-22.1, enter the name of the foreign country where the financial account is located
- 8 During 2012, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?
- If "Yes," you may have to file Form 3520. See instructions

Yes No

X

X

**SCHEDULE E**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Supplemental Income and Loss**

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

▶ Attach to Form 1040, 1040NR, or Form 1041.

▶ Information about Schedule E and its separate instructions is at [www.irs.gov/form1040](http://www.irs.gov/form1040).

OMB No. 1545-0074

**2012**

Attachment  
Sequence No. 13

Name(s) shown on return

Your social security number

CARL M. & BARBARA LEVIN

**Part I** **Income or Loss From Rental Real Estate and Royalties** Note. If you are in the business of renting personal property, use

Schedule C or C-EZ (see instructions). If you are an individual, report farm rental income or loss from Form 4835 on page 2, line 40.

A Did you make any payments in 2012 that would require you to file Form(s) 1099? (see instructions)

☐ Yes ☒ No

B If "Yes," did you or will you file all required Forms 1099?

☐ Yes ☐ No

1a Physical address of each property (street, city, state, ZIP code)

A [REDACTED]

B [REDACTED]

C [REDACTED]

1b	Type of Property (from list below)	2 For each rental real estate property listed above, report the number of fair rental and personal use days. Check the QJV box only if you meet the requirements to file as a qualified joint venture. See instructions.	Fair Rental Days	Personal Use Days	QJV
A	1		366		
B					
C					

**Type of Property:**

- 1 Single Family Residence    3 Vacation/Short-Term Rental    5 Land    7 Self-Rental  
2 Multi-Family Residence    4 Commercial    6 Royalties    8 Other (describe)

<b>Income:</b>		<b>Properties:</b>	<b>A</b>	<b>B</b>	<b>C</b>
3	Rents received	3	15,600.		
4	Royalties received	4			
<b>Expenses:</b>					
5	Advertising	5			
6	Auto and travel (see instructions)	6			
7	Cleaning and maintenance	7			
8	Commissions	8			
9	Insurance	9	598.		
10	Legal and other professional fees	10			
11	Management fees	11			
12	Mortgage interest paid to banks, etc. (see instructions)	12			
13	Other interest	13			
14	Repairs	14	2,541.		
15	Supplies	15			
16	Taxes	16	1,911.		
17	Utilities	17	1,170.		
18	Depreciation expense or depletion	18	438.		
19	Other (list) ▶ STMT 9	19	1,734.		
20	Total expenses. Add lines 5 through 19	20	8,392.		
21	Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file Form 6198	21	7,208.		
22	Deductible rental real estate loss after limitation, if any, on Form 8582 (see instructions)	22			
23a	Total of all amounts reported on line 3 for all rental properties	23a	15,600.		
b	Total of all amounts reported on line 4 for all royalty properties	23b			
c	Total of all amounts reported on line 12 for all properties	23c			
d	Total of all amounts reported on line 18 for all properties	23d	438.		
e	Total of all amounts reported on line 20 for all properties	23e	8,392.		
24	Income. Add positive amounts shown on line 21. Do not include any losses	24		7,208.	
25	Losses. Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here	25			
26	Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Form 1040, line 17, or Form 1040NR, line 18. Otherwise, include this amount in the total on line 41 on page 2	26		7,208.	

Name(s) shown on return. Do not enter name and social security number if shown on page 1.

Your social security number

CARL M. &amp; BARBARA LEVIN

Caution. The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1.

**Part II** Income or Loss From Partnerships and S Corporations Note. If you report a loss from an at-risk activity for which any amount is not at risk, you must check column (e) on line 28 and attach Form 6198. See instructions.

- 27 Are you reporting any loss not allowed in a prior year due to the at-risk or basis limitations, a prior year unallowed loss from a passive activity (if that loss was not reported on Form 8582), or unreimbursed partnership expenses? ☐ Yes ☒ No  
If you answered "Yes," see instructions before completing this section.

28	(a) Name	(b) Enter P for partnership; S for S corporation	(c) Check if foreign partnership	(d) Employer identification number	(e) Check if any amount is not at risk
A	LEVINSON-LEVIN PROPERTIES, LLC	P			
* B	LRS COMPANY	P			X
C					
D					

Passive Income and Loss		Nonpassive Income and Loss		
(f) Passive loss allowed (attach Form 8582 if required)	(g) Passive income from Schedule K-1	(h) Nonpassive loss from Schedule K-1	(i) Section 179 expense deduction from Form 4562	(j) Nonpassive income from Schedule K-1
A	30,040.			
B	0.			
C				
D				
29a Totals	30,040.			
b Totals				
30 Add columns (g) and (j) of line 29a			30	30,040.
31 Add columns (f), (h), and (i) of line 29b			31	( )
32 Total partnership and S corporation income or (loss). Combine lines 30 and 31. Enter the result here and include in the total on line 41 below			32	30,040.

**Part III** Income or Loss From Estates and Trusts

33	(a) Name	(b) Employer identification number
A		
B		

Passive Income and Loss		Nonpassive Income and Loss	
(c) Passive deduction or loss allowed (attach Form 8582 if required)	(d) Passive income from Schedule K-1	(e) Deduction or loss from Schedule K-1	(f) Other income from Schedule K-1
A			
B			
34a Totals			
b Totals			
35 Add columns (d) and (f) of line 34a			35
36 Add columns (c) and (e) of line 34b			36 ( )
37 Total estate and trust income or (loss). Combine lines 35 and 36. Enter the result here and include in the total on line 41 below			37

**Part IV** Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) - Residual Holder

38	(a) Name	(b) Employer identification number	(c) Excess inclusion from Schedules Q, line 2c (see instructions)	(d) Taxable income (net loss) from Schedules Q, line 1b	(e) Income from Schedules Q, line 3b
39	Combine columns (d) and (e) only. Enter the result here and include in the total on line 41 below				39

**Part V** Summary \* ENTIRE DISPOSITION OF PASSIVE ACTIVITY

40	Net farm rental income or (loss) from Form 4835. Also, complete line 42 below	40	
41	Total income or (loss). Combine lines 26, 32, 37, 39, and 40. Enter the result here and on Form 1040, line 17, or Form 1040NR, line 18	41	37,248.
42	Reconciliation of farming and fishing income. Enter your gross farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), box 14, code B; Schedule K-1 (Form 1120S), box 17, code U; and Schedule K-1 (Form 1041), box 14, code F (see instructions)	42	
43	Reconciliation for real estate professionals. If you were a real estate professional (see instructions), enter the net income or (loss) you reported anywhere on Form 1040 or Form 1040NR from all rental real estate activities in which you materially participated under the passive activity loss rules	43	

**SCHEDULE E**  
**INCOME FROM PASSTHROUGH STATEMENT, PAGE 1**

2012

Name CARL M. LEVIN  
Passthrough LRS COMPANY  
PARTNERSHIP

SSN/EIN

ID

TAXPAYER

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
<b>SCHEDULE E, PAGE 2</b>								
Ordinary business income (loss) .....								
Rental real estate income (loss) .....								
Other net rental income (loss) .....								
Intangible drilling costs/dry hole costs								
Self-charged passive interest expense								
Guaranteed payments .....								
Section 179 and carryover .....								
Disallowed section 179 expense .....								
Excess farm loss .....								
Net income (loss) .....								
First passive other .....			4,230.		4,230.			
Second passive other .....								
Cost depletion .....								
Percentage depletion .....								
Depletion carryover .....								
Disallowed due to 65% limitation .....								
Unreimbursed expenses (nonpassive)								
Nonpassive other .....								
Total Schedule E (page 2) .....			4,230.		4,230.			
<b>FORM 4797</b>								
Section 1231 gain (loss) .....								
Section 179 recapture on disposition								
<b>SCHEDULE D</b>								
Net short-term cap. gain (loss) .....								
Net long-term cap. gain (loss) .....								
Section 1256 contracts & straddles .....								
<b>FORM 4952</b>								
Investment interest expense - Sch. A								
Other net investment income .....								
<b>ITEMIZED DEDUCTIONS</b>								
Charitable contributions .....								
Deductions related to portfolio income								
Other .....								



SCHEDULE E

INCOME FROM PASSTHROUGH STATEMENT, PAGE 2

2012

Name CARL M. LEVIN  
 Passthrough LRS COMPANY  
 PARTNERSHIP

SSN/EIN

ID

TAXPAYER

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
<b>INTEREST AND DIVIDENDS</b>								
Interest income .....								
Interest from U.S. bonds .....								
Ordinary dividends .....								
Qualified dividends .....								
Tax-exempt interest income .....								
<b>FORM 6251</b>								
Depreciation adjustment after 12/31/86 .....								
Adjusted gain or loss .....								
Beneficiary's AMT adjustment .....								
Depletion (other than oil) .....								
Other .....								
<b>MISCELLANEOUS</b>								
Self-employment earnings (loss)/Wages .....								
Gross farming & fishing inc .....								
Royalties .....								
Royalty expenses/depletion .....								
Undistributed capital gains credit .....								
Backup withholding .....								
Credit for estimated tax .....								
Cancellation of debt .....								
Medical insurance - 1040 .....								
Dependent care benefits .....								
Retirement plans .....								
Qualified production activities income .....								
Passthrough adjustment to Form 1040 .....								
Penalty on early withdrawal of savings .....								
NOL .....								
Other taxes/recapture of credits .....								
Credits .....								
Casualty and theft loss .....								

**SCHEDULE E**

**INCOME FROM PASSTHROUGH STATEMENT, PAGE 1**

2012

Name **CARL M. LEVIN**

Partthrough **LEVINSON-LEVIN PROPERTIES, LLC**

PARTNERSHIP

SSN/EIN

ID

TAXPAYER

OTHER PASSIVE		Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
<b>SCHEDULE E, PAGE 2</b>								
Ordinary business income (loss) .....	K-1 Input							
Rental real estate income (loss) .....								
Other net rental income (loss) .....	31,430.							
Intangible drilling costs/dry hole costs .....								
Self-charged passive interest expense .....								
Guaranteed payments .....								
Section 179 and carryover .....								
Disallowed section 179 expense .....								
Excess farm loss .....								
Net income (loss) .....	31,430.							31,430.
First passive other .....	-1,390.							-1,390.
Second passive other .....								
Cost depletion .....								
Percentage depletion .....								
Depletion carryover .....								
Disallowed due to 65% limitation .....								
Unreimbursed expenses (nonpassive) .....								
Nonpassive other .....								
Total Schedule E (page 2) .....	30,040.							30,040.
<b>FORM 4797</b>								
Section 1231 gain (loss) .....								
Section 179 recapture on disposition .....								
<b>SCHEDULE D</b>								
Net short-term cap. gain (loss) .....								
Net long-term cap. gain (loss) .....								
Section 1256 contracts & straddles .....								
<b>FORM 4952</b>								
Investment interest expense - Sch. A .....								
Other net investment income .....								
<b>ITEMIZED DEDUCTIONS</b>								
Charitable contributions .....								
Deductions related to portfolio income .....								
Other .....								

**INCOME FROM PASSTHROUGH STATEMENT, PAGE 2**

2012

**SCHEDULE E**

Name **CARL M. LEVIN**

**Passthrough LEVINSON-LEVIN PROPERTIES, LLC**  
**PARTNERSHIP**

SSN/EIN

ID

TAXPAYER

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
<b>INTEREST AND DIVIDENDS</b>								
Interest income .....								
Interest from U.S. bonds .....								
Ordinary dividends .....								
Qualified dividends .....								
Tax-exempt interest income .....								
<b>FORM 6251</b>								
Depreciation adjustment after 12/31/86	6.							6.
Adjusted gain or loss .....								
Beneficiary's AMT adjustment .....								
Depletion (other than oil) .....								
Other .....								
<b>MISCELLANEOUS</b>								
Self-employment earnings (loss)/Wages								
Gross farming & fishing inc .....								
Royalties .....								
Royalty expenses/depletion .....								
Undistributed capital gains credit .....								
Backup withholding .....								
Credit for estimated tax .....								
Cancellation of debt .....								
Medical Insurance - 1040 .....								
Dependent care benefits .....								
Retirement plans .....								
Qualified production activities income .....								
Passthrough adjustment to Form 1040								
Penalty on early withdrawal of savings								
NOL .....								
Other taxes/recapture of credits .....								
Credits .....								
Casualty and theft loss .....								

# At-Risk Limitations

- ▶ Attach to your tax return.
- ▶ See separate instructions.

OMB No. 1545-0712

Attachment  
Sequence No. **31**

Name(s) shown on return

Identifying number

**CARL M. LEVIN**

Description of activity (see page 2 of the instructions)

**LRS COMPANY**

**Part I** Current Year Profit (Loss) From the Activity, Including Prior Year Nondeductible Amounts. See page 2 of the instructions.

1	Ordinary income (loss) from the activity (see page 2 of the instructions)	1	-4,230.
2	Gain (loss) from the sale or other disposition of assets used in the activity (or of your interest in the activity) that you are reporting on:		
a	Schedule D	2a	
b	Form 4797	2b	
c	Other form or schedule	2c	
3	Other income and gains from the activity, from Schedule K-1 of Form 1065, Form 1065-B, or Form 1120S, that were not included on lines 1 through 2c	3	
4	Other deductions and losses from the activity, including investment interest expense allowed from Form 4952, that were not included on lines 1 through 2c	4	( )
5	Current year profit (loss) from the activity. Combine lines 1 through 4. See page 3 of the instructions before completing the rest of this form	5	-4,230.

**Part II** Simplified Computation of Amount At Risk. See page 3 of the instructions before completing this part.

6	Adjusted basis (as defined in section 1011) in the activity (or in your interest in the activity) on the first day of the tax year. Do not enter less than zero	6	0.
7	Increases for the tax year (see page 3 of the instructions)	7	
8	Add lines 6 and 7	8	
9	Decreases for the tax year (see page 4 of the instructions)	9	
10a	Subtract line 9 from line 8	10a	
b	If line 10a is more than zero, enter that amount here and go to line 20 (or complete Part III). Otherwise, enter -0- and see Pub. 925 for information on the recapture rules	10b	

**Part III** Detailed Computation of Amount At Risk.

If you completed Part III of Form 6198 for the prior year, see page 4 of the instructions.

11	Investment in the activity (or in your interest in the activity) at the effective date. Do not enter less than zero	11	
12	Increases at effective date	12	
13	Add lines 11 and 12	13	
14	Decreases at effective date	14	
15	Amount at risk (check box that applies):		
a	<input type="checkbox"/> At effective date. Subtract line 14 from line 13. Do not enter less than zero.	15	
b	<input type="checkbox"/> From your prior year Form 6198, line 19b. Do not enter the amount from line 10b of your prior year form.		
16	Increases since (check box that applies):		
a	<input type="checkbox"/> Effective date	16	
b	<input type="checkbox"/> The end of your prior year	17	
17	Add lines 15 and 16	17	
18	Decreases since (check box that applies):		
a	<input type="checkbox"/> Effective date	18	
b	<input type="checkbox"/> The end of your prior year		
19a	Subtract line 18 from line 17	19a	
b	If line 19a is more than zero, enter that amount here and go to line 20. Otherwise, enter -0- and see Pub. 925 for information on the recapture rules	19b	

**Part IV** Deductible Loss

20	Amount at risk. Enter the larger of line 10b or line 19b	20	0.
21	Deductible loss. Enter the smaller of the line 5 loss (treated as a positive number) or line 20. See the instructions to find out how to report any deductible loss and any carryover	21	( ) 0

Note: If the loss is from a passive activity, see the Instructions for Form 8582, Passive Activity Loss Limitations, or the Instructions for Form 8810, Corporate Passive Activity Loss and Credit Limitations, to find out if the loss is allowed under the passive activity rules. If only part of the loss is subject to the passive activity loss rules, report only that part on Form 8582 or Form 8810, whichever applies.

Form **6251**Department of the Treasury  
Internal Revenue Service (99)**Alternative Minimum Tax - Individuals**▶ Information about Form 6251 and its separate instructions is at [www.irs.gov/form6251](http://www.irs.gov/form6251).  
▶ Attach to Form 1040 or Form 1040NR.

OMB No. 1545-0074

**2012**Attachment  
Sequence No. **32**

Name(s) shown on Form 1040 or Form 1040NR

Your social security number

**CARL M. & BARBARA LEVIN****Part I Alternative Minimum Taxable Income**

1 If filing Schedule A (Form 1040), enter the amount from Form 1040, line 41, and go to line 2. Otherwise, enter the amount from Form 1040, line 38, and go to line 7. (If less than zero, enter as a negative amount.)	1	193,116.
2 Medical and dental. Enter the smaller of Schedule A (Form 1040), line 4, or 2.5% (.025) of Form 1040, line 38. If zero or less, enter -0-	2	
3 Taxes from Schedule A (Form 1040), line 9	3	18,570.
4 Enter the home mortgage interest adjustment, if any, from line 6 of the worksheet in the instructions for this line	4	
5 Miscellaneous deductions from Schedule A (Form 1040), line 27	5	4,080.
6 Skip this line. It is reserved for future use	6	
7 Tax refund from Form 1040, line 10 or line 21	7	
8 Investment interest expense (difference between regular tax and AMT)	8	
9 Depletion (difference between regular tax and AMT)	9	
10 Net operating loss deduction from Form 1040, line 21. Enter as a positive amount	10	
11 Alternative tax net operating loss deduction	11	
12 Interest from specified private activity bonds exempt from the regular tax	12	
13 Qualified small business stock (7% of gain excluded under section 1202)	13	
14 Exercise of incentive stock options (excess of AMT income over regular tax income)	14	
15 Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	15	
16 Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)	16	
17 Disposition of property (difference between AMT and regular tax gain or loss)	17	
18 Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	18	
19 Passive activities (difference between AMT and regular tax income or loss) <b>SEE STATEMENT 11</b>	19	58.
20 Loss limitations (difference between AMT and regular tax income or loss)	20	
21 Circulation costs (difference between regular tax and AMT)	21	
22 Long-term contracts (difference between AMT and regular tax income)	22	
23 Mining costs (difference between regular tax and AMT)	23	
24 Research and experimental costs (difference between regular tax and AMT)	24	
25 Income from certain installment sales before January 1, 1987	25	
26 Intangible drilling costs preference	26	
27 Other adjustments, including income-based related adjustments	27	
28 <b>Alternative minimum taxable income.</b> Combine lines 1 through 27. (If married filing separately, see instructions.)	28	215,824.

**Part II Alternative Minimum Tax (AMT)**

29 Exemption. See instructions <b>SEE STATEMENT 12</b>	29	62,294.
30 Subtract line 29 from line 28. If more than zero, go to line 31. If zero or less, enter -0- here and on lines 31, 33, and 35, and go to line 34	30	153,530.
31 • If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter. • If you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on page 2 and enter the amount from line 54 here. • <b>All others:</b> If line 30 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 30 by 26% (.26). Otherwise, multiply line 30 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result.	31	39,918.
32 Alternative minimum tax foreign tax credit (see instructions)	32	
33 Tentative minimum tax. Subtract line 32 from line 31	33	39,918.
34 Tax from Form 1040, line 44 (minus any tax from Form 4972 and any foreign tax credit from Form 1040, line 47). If you used Sch J to figure your tax, the amount from line 44 of Form 1040 must be refigured without using Sch J	34	39,723.
35 <b>AMT.</b> Subtract line 34 from line 33. If zero or less, enter -0-. Enter here and on Form 1040, line 45	35	195.

LHA For Paperwork Reduction Act Notice, see your tax return instructions.

Form 6251 (2012)

**Part III Tax Computation Using Maximum Capital Gains Rates**

Complete Part III only if you are required to do so by line 31 or by the Foreign Earned Income Tax Worksheet in the instructions.

36	Enter the amount from Form 6251, line 30. If you are filing Form 2555 or 2555-EZ, enter the amount from line 3 of the worksheet in the instructions for line 31	36
37	Enter the amount from line 6 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 13 of the Schedule D Tax Worksheet in the instructions for Schedule D (Form 1040), whichever applies (as figured for the AMT, if necessary) (see instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	37
38	Enter the amount from Schedule D (Form 1040), line 19 (as figured for the AMT, if necessary) (see instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	38
39	If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 37. Otherwise, add lines 37 and 38, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as figured for the AMT, if necessary). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	39
40	Enter the smaller of line 36 or line 39	40
41	Subtract line 40 from line 36	41
42	If line 41 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 41 by 26% (.26). Otherwise, multiply line 41 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result	42
43	Enter: <ul style="list-style-type: none"> <li>\$70,700 if married filing jointly or qualifying widow(er),</li> <li>\$35,350 if single or married filing separately, or</li> <li>\$47,350 if head of household.</li> </ul>	43
44	Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D (Form 1040), whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter -0-	44
45	Subtract line 44 from line 43. If zero or less, enter -0-	45
46	Enter the smaller of line 36 or line 37	46
47	Enter the smaller of line 45 or line 46	47
48	Subtract line 47 from line 46	48
49	Multiply line 48 by 15% (.15)	49
If line 38 is zero or blank, skip lines 50 and 51 and go to line 52. Otherwise, go to line 50.		
50	Subtract line 46 from line 40	50
51	Multiply line 50 by 25% (.25)	51
52	Add lines 42, 49, and 51	52
53	If line 36 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result	53
54	Enter the smaller of line 52 or line 53 here and on line 31. If you are filing Form 2555 or 2555-EZ, do not enter this amount on line 31. Instead, enter it on line 4 of the worksheet in the instructions for line 31	54

# ALTERNATIVE MINIMUM TAX RECONCILIATION REPORT

Name(s)							Social Security Number	
CARL M. & BARBARA LEVIN								
Form Name	Description	Income	Form 6251, Line 17	Form 6251, Line 18	Form 6251, Line 19	Form 6251, Line 20	Form 6251 Other Adjustment	
E-	RENTAL PORTION OF RESIDENCE - [REDACTED]							
	* REGULAR INCOME	7,208.						
	AMT DEPR ADJ	52.			52.			
	* AMT NET INCOME	7,260.			52.			
K1-	LEVINSON-LEVIN PROPERTIES, LLC							
	* REGULAR INCOME	30,040.						
	AMT ADJUSTMENTS	6.			6.			
	* AMT NET INCOME	30,046.			6.			
	** TOTAL ADJ & PREF **				58.			



**SCHEDULE H**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Household Employment Taxes**

(For Social Security, Medicare, Withheld Income, and Federal Unemployment (FUTA) Taxes)

▶ Attach to Form 1040, 1040NR, 1040-SS, or 1041.

▶ See separate instructions.

OMB No. 1545-1971

**2012**

Attachment  
Sequence No. **44**

Name of employer

Social security number

Employer identification number

BARBARA LEVIN

**A** Did you pay **any one** household employee cash wages of \$1,800 or more in 2012? (If any household employee was your spouse, your child under age 21, your parent, or anyone under age 18, see the line A instructions before you answer this question.)

- ☒ **Yes.** Skip lines B and C and go to line 1.  
☐ **No.** Go to line B.

**B** Did you withhold federal income tax during 2012 for any household employee?

- ☐ **Yes.** Skip line C and go to line 5.  
☐ **No.** Go to line C.

**C** Did you pay **total** cash wages of \$1,000 or more in **any** calendar **quarter** of 2011 or 2012 to **all** household employees? (Do not count cash wages paid in 2011 or 2012 to your spouse, your child under age 21, or your parent.)

- ☐ **No.** **Stop.** Do not file this schedule.  
☐ **Yes.** Skip lines 1-7 and go to line 8. (Calendar year taxpayers having no household employees in 2012 do not have to complete this form for 2012.)

**Part I Social Security, Medicare, and Federal Income Taxes**

1	Total cash wages subject to social security taxes	1	5,100.	
2	Social security taxes. Multiply line 1 by 10.4% (.104)	2		530.
3	Total cash wages subject to Medicare taxes	3	5,100.	
4	Medicare taxes. Multiply line 3 by 2.9% (.029)	4		148.
5	Federal income tax withheld, if any	5		
6	Total social security, Medicare, and federal income taxes. Add lines 2, 4, and 5	6		678.

**7** Did you pay **total** cash wages of \$1,000 or more in **any** calendar **quarter** of 2011 or 2012 to **all** household employees? (Do not count cash wages paid in 2011 or 2012 to your spouse, your child under age 21, or your parent.)

- ☐ **No.** **Stop.** Include the amount from line 6 above on Form 1040, line 59a. If you are not required to file Form 1040, see the line 7 instructions.  
☒ **Yes.** Go to line 8.

LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

Schedule H (Form 1040) 2012



**Part II Federal Unemployment (FUTA) Tax**

	Yes	No
8 Did you pay unemployment contributions to only one state? (If you paid contributions to a credit reduction state, see instructions and check "No.")	<input checked="" type="checkbox"/>	
9 Did you pay all state unemployment contributions for 2012 by April 15, 2013? Fiscal year filers see instructions	<input checked="" type="checkbox"/>	
10 Were all wages that are taxable for FUTA tax also taxable for your state's unemployment tax?	<input checked="" type="checkbox"/>	

Next: If you checked the "Yes" box on all the lines above, complete Section A.  
If you checked the "No" box on any of the lines above, skip Section A and complete Section B.

**Section A**

11 Name of the state where you paid unemployment contributions	DC	
12 Contributions paid to your state unemployment fund	12	92.
13 Total cash wages subject to FUTA tax	13	5,100.
14 FUTA tax. Multiply line 13 by .6% (.006). Enter the result here, skip Section B, and go to line 23	14	31.

**Section B**

15 Complete all columns below that apply (If you need more space, see instructions):

(a) Name of state	(b) Taxable wages (as defined in state act)	(c) State experience rate period		(d) State experience rate	(e) Multiply col. (b) by .054	(f) Multiply col. (b) by col. (d)	(g) Subtract col. (f) from col. (e). If zero or less, enter -0-	(h) Contributions paid to state unemployment fund
		From	To					
16 Totals					16			
17 Add columns (g) and (h) of line 16					17			
18 Total cash wages subject to FUTA tax (see the line 13 instructions)							18	
19 Multiply line 18 by 6.0% (.060)							19	
20 Multiply line 18 by 5.4% (.054)					20			
21 Enter the smaller of line 17 or line 20 (Employers in a credit reduction state must use the worksheet and check here)							21	
22 FUTA tax. Subtract line 21 from line 19. Enter the result here and go to line 23							22	

**Part III Total Household Employment Taxes**

23 Enter the amount from line 6. If you checked the "Yes" box on line C of page 1, enter -0-	23	678.
24 Add line 14 (or line 22) and line 23	24	709.
25 Are you required to file Form 1040? <input checked="" type="checkbox"/> Yes. Stop. Include the amount from line 24 above on Form 1040, line 59a. Do not complete Part IV below. <input type="checkbox"/> No. You may have to complete Part IV. See instructions for details.		

**Part IV Address and Signature - Complete this part only if required. See the line 25 instructions.**

Address (number and street) or P.O. box if mail is not delivered to street address	Apt., room, or suite no.
City, town or post office, state, and ZIP code	

Under penalties of perjury, I declare that I have examined this schedule, including accompanying statements, and to the best of my knowledge and belief, it is true, correct, and complete. No part of any payment made to a state unemployment fund claimed as a credit was, or is to be, deducted from the payments to employees. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Employer's signature	Date
Paid Preparer Use Only	Print/Type preparer's name
	Preparer's signature
	Date
	Check <input type="checkbox"/> if self-employed
	PTIN
	Firm's name
	Firm's EIN
	Firm's address
	Phone no.

Form **8801**Department of the Treasury  
Internal Revenue Service (99)**Credit for Prior Year Minimum Tax -  
Individuals, Estates, and Trusts**▶ Information about Form 8801 and its separate instructions is at [www.irs.gov/form8801](http://www.irs.gov/form8801).

▶ Attach to Form 1040, 1040NR, or 1041.

OMB No. 1545-1073

**2012**Attachment  
Sequence No. 74

Name(s) shown on return

Identifying number

**CARL M. & BARBARA LEVIN****Part I Net Minimum Tax on Exclusion Items**

1 Combine lines 1 and 10 of your 2011 Form 6251. Estates and trusts, see instructions	1	189,569.
2 Enter adjustments and preferences treated as exclusion items (see instructions)	2	21,605.
3 Minimum tax credit net operating loss deduction (see instructions)	3	( )
4 Combine lines 1, 2, and 3. If zero or less, enter -0- here and on line 15 and go to Part II. If more than \$223,900 and you were married filing separately for 2011, see instructions	4	211,174.
5 Enter: \$74,450 if married filing jointly or qualifying widow(er) for 2011; \$48,450 if single or head of household for 2011; or \$37,225 if married filing separately for 2011. Estates and trusts, enter \$22,500	5	74,450.
6 Enter: \$150,000 if married filing jointly or qualifying widow(er) for 2011; \$112,500 if single or head of household for 2011; or \$75,000 if married filing separately for 2011. Estates and trusts, enter \$75,000	6	150,000.
7 Subtract line 6 from line 4. If zero or less, enter -0- here and on line 8 and go to line 9	7	61,174.
8 Multiply line 7 by 25% (.25)	8	15,294.
9 Subtract line 8 from line 5. If zero or less, enter -0-. If under age 24 at the end of 2011, see instructions	9	59,156.
10 Subtract line 9 from line 4. If zero or less, enter -0- here and on line 15 and go to Part II. Form 1040NR filers, see instructions	10	152,018.
11 • If for 2011 you filed Form 2555 or 2555-EZ, see instructions for the amount to enter. • If for 2011 you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b (Form 1041, line 2b(2)); or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (lines 14a and 15, column (2), of Schedule D (Form 1041)), complete Part III of Form 8801 and enter the amount from line 47 here. Form 1040NR filers, see instructions. • All others: If line 10 is \$175,000 or less (\$87,500 or less if married filing separately for 2011), multiply line 10 by 26% (.26). Otherwise, multiply line 10 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2011) from the result. Form 1040NR filers, see instructions.	11	39,525.
12 Minimum tax foreign tax credit on exclusion items (see instructions)	12	
13 Tentative minimum tax on exclusion items. Subtract line 12 from line 11	13	39,525.
14 Enter the amount from your 2011 Form 6251, line 34, or 2011 Form 1041, Schedule I, line 55	14	39,077.
15 Net minimum tax on exclusion items. Subtract line 14 from line 13. If zero or less, enter -0-	15	448.

LHA For Paperwork Reduction Act Notice, see instructions.

Form 8801 (2012)

**Part I Current Year Nonrefundable and Refundable Credits and Carryforward to 2013**

16 Enter the amount from your 2011 Form 6251, line 35, or 2011 Form 1041, Schedule I, line 56 .....	16	490.
17 Enter the amount from line 15 .....	17	448.
18 Subtract line 17 from line 16. If less than zero, enter as a negative amount .....	18	42.
19 2011 credit carryforward. Enter the amount from your 2011 Form 8801, line 28 .....	19	105.
20 Enter your 2011 unallowed qualified electric vehicle credit (see instructions) .....	20	
21 Combine lines 18 through 20. If zero or less, stop here and see the instructions .....	21	147.
22 Enter your 2012 regular income tax liability minus allowable credits (see instructions) .....	22	39,723.
23 Enter the amount from your 2012 Form 6251, line 33, or 2012 Form 1041, Schedule I, line 54 .....	23	39,918.
24 Subtract line 23 from line 22. If zero or less, enter -0- .....	24	0.
25 Current year nonrefundable credit. Enter the smaller of line 21 or line 24. Also enter this amount on your 2012 Form 1040, line 53 (check box b); Form 1040NR, line 50 (check box b); or Form 1041, Schedule G, line 2c .....	25	0.
26 Estates and trusts: Skip lines 26 and 27 and go to line 28. Individuals: Did you have a minimum tax credit carryforward to 2010 (on your 2009 Form 8801, line 30)?  <input type="checkbox"/> No. Leave lines 26 and 27 blank and go to line 28.  <input checked="" type="checkbox"/> Yes. Complete Part IV of Form 8801 to figure the amount to enter .....	26	38.
27 Is line 26 more than line 25?  <input type="checkbox"/> No. Leave line 27 blank and go to line 28.  <input checked="" type="checkbox"/> Yes. Subtract line 25 from line 26. This is your current year refundable credit. Enter the result here and on your 2012 Form 1040, line 71 (check box c), or Form 1040NR, line 67 (check box c) .....	27	38.
28 Credit carryforward to 2013. Subtract the larger of line 25 or line 26 from line 21. Keep a record of this amount because you may use it in future years .....	28	109.

Form 8801 (2012)

**Part III Tax Computation Using Maximum Capital Gains Rates**

**Caution.** If you did not complete the 2011 Qualified Dividends and Capital Gain Tax Worksheet, the 2011 Schedule D Tax Worksheet, or Part V of the 2011 Schedule D (Form 1041), see the instructions before completing this part.

- 29 Enter the amount from Form 8801, line 10. If you filed Form 2555 or 2555-EZ for 2011, enter the amount from line 3 of the Foreign Earned Income Tax Worksheet in the instructions ..... **29**
- Caution.** If for 2011 you filed Form 1040NR, 1041, 2555, or 2555-EZ, see the instructions before completing lines 30, 31, and 32.

- 30 Enter the amount from line 6 of your 2011 Qualified Dividends and Capital Gain Tax Worksheet, the amount from line 13 of your 2011 Schedule D Tax Worksheet, or the amount from line 22 of the 2011 Schedule D (Form 1041), whichever applies\* ..... **30**

If you figured your 2011 tax using the 2011 Qualified Dividends and Capital Gain Tax Worksheet, skip line 31 and enter the amount from line 30 on line 32. Otherwise, go to line 31.

- 31 Enter the amount from line 19 of your 2011 Schedule D (Form 1040), or line 14b, column (2), of the 2011 Schedule D (Form 1041) ..... **31**
- 32 Add lines 30 and 31, and enter the smaller of that result or the amount from line 10 of your 2011 Schedule D Tax Worksheet ..... **32**
- 33 Enter the smaller of line 29 or line 32 ..... **33**
- 34 Subtract line 33 from line 29 ..... **34**

- 35 If line 34 is \$175,000 or less (\$87,500 or less if married filing separately for 2011), multiply line 34 by 26% (.26). Otherwise, multiply line 34 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2011) from the result. Form 1040NR filers, see instructions ..... **35**

- 36 Enter:

- \$69,000 if married filing jointly or qualifying widow(er) for 2011,
- \$34,500 if single or married filing separately for 2011,
- \$46,250 if head of household for 2011, or
- \$2,300 for an estate or trust.

Form 1040NR filers, see instructions ..... **36**

- 37 Enter the amount from line 7 of your 2011 Qualified Dividends and Capital Gain Tax Worksheet, the amount from line 14 of your 2011 Schedule D Tax Worksheet, or the amount from line 23 of the 2011 Schedule D (Form 1041), whichever applies. If you did not complete either worksheet or Part V of the 2011 Schedule D (Form 1041), enter -0-. Form 1040NR filers, see instructions ..... **37**

- 38 Subtract line 37 from line 36. If zero or less, enter -0- ..... **38**
- 39 Enter the smaller of line 29 or line 30 ..... **39**
- 40 Enter the smaller of line 38 or line 39 ..... **40**
- 41 Subtract line 40 from line 39 ..... **41**
- 42 Multiply line 41 by 15% (.15) ..... **42**

If line 31 is zero or blank, skip lines 43 and 44 and go to line 45. Otherwise, go to line 43.

- 43 Subtract line 39 from line 33 ..... **43**
- 44 Multiply line 43 by 25% (.25) ..... **44**
- 45 Add lines 35, 42, and 44 ..... **45**
- 46 If line 29 is \$175,000 or less (\$87,500 or less if married filing separately for 2011), multiply line 29 by 26% (.26). Otherwise, multiply line 29 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2011) from the result. Form 1040NR filers, see instructions ..... **46**
- 47 Enter the smaller of line 45 or line 46 here and on line 11. If you filed Form 2555 or 2555-EZ for 2011, do not enter this amount on line 11. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet in the instructions ..... **47**

\* The 2011 Qualified Dividends and Capital Gain Tax Worksheet is in the 2011 Instructions for Form 1040. The 2011 Schedule D Tax Worksheet is in the 2011 Instructions for Schedule D (Form 1040) (or the 2011 Instructions for Schedule D (Form 1041)).

**Part IV** Tentative Refundable Credit

48	Enter the amount from line 21 .....	48	147.
49	Enter the total of lines 18 and 20 from your 2010 Form 8801. If zero or less, enter -0- .....	49	35.
50	Enter the total of lines 18 and 20 from your 2011 Form 8801. If zero or less, enter -0- .....	50	19.
51	Enter the total of lines 18 and 20 from your 2012 Form 8801. If zero or less, enter -0- .....	51	42.
52	Add lines 49 through 51 .....	52	96.
53	Long-term unused minimum tax credit. Subtract line 52 from line 48 (If zero or less, enter -0- here and on line 26. Do not complete the rest of Part IV) .....	53	51.
54	Multiply line 53 by 50% (.50) .....	54	26.
55	Enter the amount from your 2011 Form 8801, line 57 .....	55	38.
56	Enter the larger of line 54 or line 55 .....	56	38.
57	Enter the smaller of line 53 or line 56. Enter the result here and on line 26 .....	57	38.

Form 8801 (2012)

FORM 1040

SOCIAL SECURITY BENEFITS WORKSHEET

STATEMENT 1

## CHECK ONLY ONE BOX:

- A. SINGLE, HEAD OF HOUSEHOLD, OR QUALIFYING WIDOW(ER)  
X B. MARRIED FILING JOINTLY  
C. MARRIED FILING SEPARATELY AND LIVED WITH YOUR SPOUSE  
AT ANY TIME DURING 2012  
D. MARRIED FILING SEPARATELY AND LIVED APART FROM YOUR SPOUSE  
FOR ALL OF 2012

1. ENTER THE TOTAL AMOUNT FROM BOX 5 OF ALL YOUR  
FORMS SSA-1099 AND RRB-1099. ALSO, ENTER THIS AMOUNT ON  
FORM 1040, LINE 20A. . . . . 44,863.  
IF YOU CHECKED BOX B: TAXPAYER AMOUNT . . . . . 28,195.  
SPOUSE AMOUNT . . . . . 16,668.
2. ENTER ONE HALF OF LINE 1 . . . . . 22,432.
3. ADD THE AMOUNTS ON FORM 1040, LINE 7, 8B, 9A, 10 THRU 14,  
15B, 16B, 17 THRU 19, 21 AND SCHEDULE B, LINE 2. DO NOT  
INCLUDE ANY AMOUNTS FROM BOX 5 OF FORMS SSA-1099 OR RRB-1099 . . . . . 198,128.
4. ENTER THE AMOUNT OF ANY EXCLUSIONS FROM FOREIGN EARNED  
INCOME, FOREIGN HOUSING, INCOME FROM U.S. POSSESSIONS,  
OR INCOME FROM PUERTO RICO BY BONA FIDE RESIDENTS OF  
PUERTO RICO THAT YOU CLAIMED . . . . .
5. ADD LINES 2, 3, AND 4. . . . . 220,560.
6. ADD THE AMOUNTS ON FORM 1040, LINES 23 THROUGH LINE 32,  
AND ANY WRITE-IN ADJUSTMENTS YOU ENTERED ON THE DOTTED  
LINE NEXT TO LINE 36. . . . . 0.
7. SUBTRACT LINE 6 FROM LINE 5 . . . . . 220,560.
8. ENTER: \$25,000 IF YOU CHECKED BOX A OR D, OR  
\$32,000 IF YOU CHECKED BOX B, OR  
\$-0- IF YOU CHECKED BOX C. . . . . 32,000.
9. IS THE AMOUNT ON LINE 8 LESS THAN THE AMOUNT ON LINE 7?  
[ ] NO. STOP. NONE OF YOUR SOCIAL SECURITY BENEFITS ARE  
TAXABLE. ENTER -0- ON FORM 1040, LINE 20B. IF YOU ARE  
MARRIED FILING SEPARATELY AND YOU LIVED APART FROM YOUR  
SPOUSE FOR ALL OF 2012, BE SURE YOU ENTERED 'D' TO THE  
RIGHT OF THE WORD "BENEFITS" ON LINE 20A.  
[X] YES. SUBTRACT LINE 8 FROM LINE 7 . . . . . 188,560.
10. ENTER \$9,000 IF YOU CHECKED BOX A OR D,  
\$12,000 IF YOU CHECKED BOX B  
\$-0- IF YOU CHECKED BOX C . . . . . 12,000.
11. SUBTRACT LINE 10 FROM LINE 9. IF ZERO OR LESS, ENTER -0-. . . . . 176,560.
12. ENTER THE SMALLER OF LINE 9 OR LINE 10 . . . . . 12,000.
13. ENTER ONE HALF OF LINE 12. . . . . 6,000.
14. ENTER THE SMALLER OF LINE 2 OR LINE 13 . . . . . 6,000.
15. MULTIPLY LINE 11 BY 85% (.85). IF LINE 11 IS ZERO, ENTER -0-. . . . . 150,076.
16. ADD LINES 14 AND 15. . . . . 156,076.
17. MULTIPLY LINE 1 BY 85% (.85) . . . . . 38,134.
18. TAXABLE BENEFITS. ENTER THE SMALLER OF LINE 16 OR LINE 17  
\* ALSO ENTER THIS AMOUNT ON FORM 1040, LINE 20B . . . . . 38,134.

FORM 1040

STATE AND LOCAL INCOME TAX REFUNDS

STATEMENT

2

	2011	2010	2009
	<u>                    </u>	<u>                    </u>	<u>                    </u>
GROSS STATE/LOCAL INC TAX REFUNDS	MICHIGAN 33.		
LESS: TAX PAID IN FOLLOWING YEAR			
	<u>                    </u>	<u>                    </u>	<u>                    </u>
NET TAX REFUNDS MICHIGAN	33.		
	<u>                    </u>	<u>                    </u>	<u>                    </u>
TOTAL NET TAX REFUNDS	33.		
	<u>                    </u>	<u>                    </u>	<u>                    </u>

FORM 1040	TAXABLE STATE AND LOCAL INCOME TAX REFUNDS	STATEMENT	3
	2011	2010	2009
NET TAX REFUNDS FROM STATE AND LOCAL INCOME TAX REFUNDS STMT.	33.		
LESS: REFUNDS-NO BENEFIT DUE TO AMT -SALES TAX BENEFIT REDUCTION	33.		
1 NET REFUNDS FOR RECALCULATION			
2 TOTAL ITEMIZED DEDUCTIONS BEFORE PHASEOUT	44,006.		
3 DEDUCTION NOT SUBJ TO PHASEOUT			
4 NET REFUNDS FROM LINE 1			
5 LINE 2 MINUS LINES 3 AND 4	44,006.		
6 MULT LN 5 BY APPL SEC. 68 PCT			
7 PRIOR YEAR AGI			
8 ITEM. DED. PHASEOUT THRESHOLD			
9 SUBTRACT LINE 8 FROM LINE 7 (IF ZERO OR LESS, SKIP LINES 10 THROUGH 15, AND ENTER AMOUNT FROM LINE 1 ON LINE 16)			
10 MULT LN 9 BY APPL SEC. 68 PCT			
11 ALLOWABLE ITEMIZED DEDUCTIONS (LINE 5 LESS THE LESSER OF LINE 6 OR LINE 10)			
12 ITEM DED. NOT SUBJ TO PHASEOUT			
13A TOTAL ADJ. ITEMIZED DEDUCTIONS	44,006.		
13B PRIOR YR. STD. DED. AVAILABLE	13,900.		
14 PRIOR YR. ALLOWABLE ITEM. DED.	44,006.		
15 SUBTRACT THE GREATER OF LINE 13A OR LINE 13B FROM LINE 14			
16 TAXABLE REFUNDS (LESSER OF LINE 15 OR LINE 1)			
17 ALLOWABLE PRIOR YR. ITEM. DED.	44,006.		
18 PRIOR YEAR STD. DED. AVAILABLE	13,900.		
19 SUBTRACT LINE 18 FROM LINE 17	30,106.		
20 LESSER OF LINE 16 OR LINE 19			
21 PRIOR YEAR TAXABLE INCOME	182,169.		
22 AMOUNT TO INCLUDE ON FORM 1040, LINE 10 * IF LINE 21 IS -0- OR MORE, USE AMOUNT FROM LINE 20 * IF LINE 21 IS A NEGATIVE AMOUNT, NET LINES 20 AND 21			0.
STATE AND LOCAL INCOME TAX REFUNDS PRIOR TO 2009			
TOTAL TO FORM 1040, LINE 10			0.



FORM 1040

IRA DISTRIBUTIONS

STATEMENT 4

NAME OF PAYER	GROSS DISTRIBUTION	TAXABLE AMOUNT
FIDELITY INVESTMENTS	9,547.	9,547.
TOTAL TO FORM 1040, LINE 15	9,547.	9,547.

FORM 1040

WAGES RECEIVED AND TAXES WITHHELD

STATEMENT 5

T S EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICARE TAX
T UNITED STATES SENATE	151,121.	31,561.	5,726.		4,624.	2,438.
TOTALS	151,121.	31,561.	5,726.		4,624.	2,438.

FORM 1040

FEDERAL INCOME TAX WITHHELD

STATEMENT 6

T S DESCRIPTION	AMOUNT
T UNITED STATES SENATE	31,561.
T WITHHOLDING FROM FORM 1099-SSA	8,740.
S WITHHOLDING FROM FORM 1099-SSA	5,167.
TOTAL TO FORM 1040, LINE 62	45,468.

SCHEDULE A

CASH CONTRIBUTIONS

STATEMENT 7

DESCRIPTION	AMOUNT 50% LIMIT	AMOUNT 30% LIMIT
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]

CARL M. & BARBARA LEVIN

SUBTOTALS

20,496.

TOTAL TO SCHEDULE A, LINE 16

20,496.

SCHEDULE A

REAL ESTATE TAXES

STATEMENT

8

DESCRIPTION

AMOUNT

DC HOME

3,822.

LIONS DEN - REAL ESTATE

3,606.

TOTAL TO SCHEDULE A, LINE 6

7,428.

SCHEDULE E

OTHER EXPENSES

STATEMENT

9

RENTAL PORTION OF RESIDENCE -

DESCRIPTION

AMOUNT

YARD MAINTENANCE

1,544.

PEST CONTROL

190.

TOTAL TO SCHEDULE E, PAGE 1, LINE 19

1,734.

FORM 6198

ALLOCATION OF ALLOWABLE LOSSES

STATEMENT

10

LRS COMPANY

DESCRIPTION

LOSS

PERCENT  
OF LOSS

ALLOCATION  
OF AT-RISK

ALLOWABLE  
LOSS

DISALLOWED  
LOSS

SCHEDULE E C/O

4,230.

1.000000000

0.

0.

4,230.

TOTALS

4,230.

1.000000000

0.

0.

4,230.

FORM 6251

## PASSIVE ACTIVITIES

STATEMENT 11

NAME OF ACTIVITY	FORM	NET INCOME (LOSS)		ADJUSTMENT
		AMT	REGULAR	
LEVINSON-LEVIN PROPERTIES, LLC	SCH E	30,046.	30,040.	6.
RENTAL PORTION OF RESIDENCE - [REDACTED]	SCH E	7,260.	7,208.	52.
TOTAL TO FORM 6251, LINE 19				58.

FORM 6251

EXEMPTION WORKSHEET

STATEMENT 12

- 1 ENTER: \$50,600 IF SINGLE OR HEAD OF HOUSEHOLD; \$78,750 IF  
MARRIED FILING JOINTLY OR QUALIFYING WIDOW(ER); \$39,375  
IF MARRIED FILING SEPARATELY. . . . . 78,750.
- 2 ENTER YOUR ALTERNATIVE MINIMUM TAXABLE INCOME  
(AMTI) FORM 6251, LINE 28 . . . . . 215,824.
- 3 ENTER: \$112,500 IF SINGLE OR HEAD OF HOUSEHOLD;  
\$150,000 IF MARRIED FILING JOINTLY OR  
QUALIFYING WIDOW(ER); \$75,000 IF MARRIED  
FILING SEPARATELY . . . . . 150,000.
- 4 SUBTRACT LINE 3 FROM LINE 2. IF ZERO OR LESS . . . . .  
ENTER -0- . . . . . 65,824.
- 5 MULTIPLY LINE 4 BY 25% (.25). . . . . 16,456.
- 6 SUBTRACT LINE 5 FROM LINE 1. IF ZERO OR LESS, ENTER -0-. IF  
ANY OF THE THREE CONDITIONS UNDER CERTAIN CHILDREN UNDER  
AGE 24 APPLY TO YOU, COMPLETE LINES 7 THROUGH 10.  
OTHERWISE, STOP HERE AND ENTER THIS AMOUNT ON FORM 6251,  
LINE 29, AND GO TO FORM 6251, LINE 30 . . . . . 62,294.
- 7 MINIMUM EXEMPTION AMOUNT FOR CERTAIN CHILDREN UNDER AGE 24. .
- 8 ENTER YOUR EARNED INCOME, IF ANY. . . . .
- 9 ADD LINES 7 AND 8 . . . . .
- 10 ENTER THE SMALLER OF LINE 6 OR LINE 9 HERE AND ON FORM 6251,  
LINE 29, AND GO TO FORM 6251, LINE 30 . . . . .